FINELINE

November 2007

Your Opinions are Important to Us

We would like to thank all of you who responded to the customer satisfaction survey that the Division of Finance recently sent out. We received meaningful feedback and comments that will help us determine and prioritize the areas in which our customers would like us to improve. The survey asked questions about how satisfied our customers are with FINET, Payroll and Employee Self Service, Data Warehouse, and Travel Office services.

The survey asked for feedback on the following 5 areas:

- Service
- Staff
- Usefulness of Information
- Communication
- Training

Each area was ranked on a scale from 1 (strongly disagree) to 5 (strongly agree). Overall, the Division scored a 4 on the survey, which means we're doing pretty well but there is still room for improvement.

We will look at every comment and determine an action plan to address the concerns identified in the survey. However, there may be some issues that we won't be able to resolve due to system or cost limitations.

We will continue to send out these surveys on a quarterly basis to different customers. If you receive a request to participate in our survey, we would ask that you take a few minutes to complete it. The surveys are completely anonymous, so if you would like a personalized response from the Division of Finance, feel free to include your name and contact information. Sometimes we are unable to resolve some of the issues that people comment on because we don't have enough information.

Jerry Gearheart to Sit on AMS Steering Committee

Congratulations to Jerry Gearheart of the Division of Finance in his new assignment. He has been elected to serve on the AMS Advantage® Steering Committee. This group is made up of elected members who represent AMS Advantage users all over the country. Jerry will serve for three years in the role of Technical Financial Manager.

His responsibilities on this committee will include:

1. Serve on the Software Change Control Board (SCCB) which reviews concept papers/designs for all proposed modifications submitted to assess priority and if they will fit in the baseline application. This board meets monthly.

2. Help determine presentations for the annual User's Forum—including participating in presentations as well as review of content.

3. Serves on Focus Groups as needed—including the current User Interface Focus Group. This group is working with CGI to determine improvements to the FINET User Interface that will be implemented in the next minor software release.

4. Act as liaison for other financial management user sites and CGI. Provide feedback that he will hear from other sites.

Jerry was elected from a list of 8 qualified nominees nationwide. We are proud that Jerry will be representing the State of Utah in this capacity and we have every confidence he will do an outstanding job.

Help Desk FAQs
by Ken Roner

Q. Is there ever a time when a vendor needs to be set up twice in FINET?

A. Yes, there are circumstances that necessitate setting up a vendor twice.

What to do? If you have an employee who will be reimbursed as an employee and also paid as a regular vendor, for example an employee who is also a board member, you will set them up with two separate vendor numbers. One will be set up for the reimbursements that are non-taxable, such as travel or mileage, and the second one for payments that are taxable. The vendor number for the non-taxable employee reimbursements will be his EIN. The vendor number for the taxable vendor payments will be assigned by FINET when the VCC is processed. When making payments make sure you use the appropriate vendor number. For more information about setting up vendors, review the Vendor/Customer section of the FINET Help. Access the Division of Finance web page at www.finance.utah.gov. Select the FINET icon, FINET Help, then select Vendor Customer from the table of contents on the left.

FINET Help is Only a Click Away

What is easier to find than a Capitol Hill parking place? What works better than a crystal ball? FINET Help, of course!

FINET Help is the official user manual for FINET and contains the information you need to process documents and access information.

FINET Help offers the following types of information:
- General information about FINET, including navigation and usage information.
- Step-by-step instructions for the most commonly used tasks (for example, searching for a reference table and creating a new document)
- Specific information about individual business processes, for example, Accounts Receivable.
- Descriptions of individual documents and fields.
- Descriptions of individual pages and fields.
- On-line training courses

Accessing FINET Help
> Access the Finance web page at www.finance.utah.gov, select the Training icon, then select FINET Help.
> Or
> From within FINET select the [Help] button at the top of the screen

Finding information
- From Table of Contents
  o Select a topic from the table of contents.
  o For Example: You want to better understand how to process payment request documents (PRC and GAX). From the table of contents on the left of the screen select Payables and Processing a Payment Request. You can learn all about processing payment requests.
- Search
  o Enter the key word into the search box at the top of the screen
  o For Example: You don't remember which function keys validate and submit documents in FINET. In the search box at the top of the FINET Help screen type the words function keys and press Enter. FINET Help lists all of the pages that include the words function keys. Scan through the listing in the table of contents area for the topic titled function keys. There you are, a page showing the function keys. If you want to print it out for future use just right click in the page and select print.

Types of Help from within FINET
- Page Help
  o Right click on any FINET page and select Help—FINET Help provides an explanation of the purpose of the page and instructions for using the page.
- Field Help
  o Right click on most any FINET field and select Help—FINET Help provides an explanation of the type of data that belongs in the field. Some fields link to the associated table so you can search for valid entries.

Printing
- When you find a page you want to print just right click in the page and select print. Remember that we update FINET Help often so your print may become obsolete over time.

FINET Forms Upgrade to Adobe 8

On November 13, 2007, the Division of Finance will be upgrading all of the FINET eforms and web forms to the Adobe version 8. All FINET users will be required to upgrade their Adobe Reader to version 8 or greater before using the new forms. The Adobe Reader must be configured properly for the Web Forms, eForms and the FINET documents and reports to save and print properly.

Recommendation:

Finance recommends all users contact their DTS support person and plan to upgrade their Adobe version to Adobe 8 or the latest version on the Adobe or Finance website by November 13, or soon thereafter. Finance will post a link on the Forms webpage to the suggested version of Adobe Reader or it may be retrieved from the Adobe site or you may use the followintg link: http://apps.finance.utah.gov/downloads. The current version is Adobe Reader 8.1.1, but this version changes frequently. Once this is downloaded and installed, verify the "Display PDF in Browser" checkbox is selected. It is located in the Adobe Reader 8 application in the menu bar:
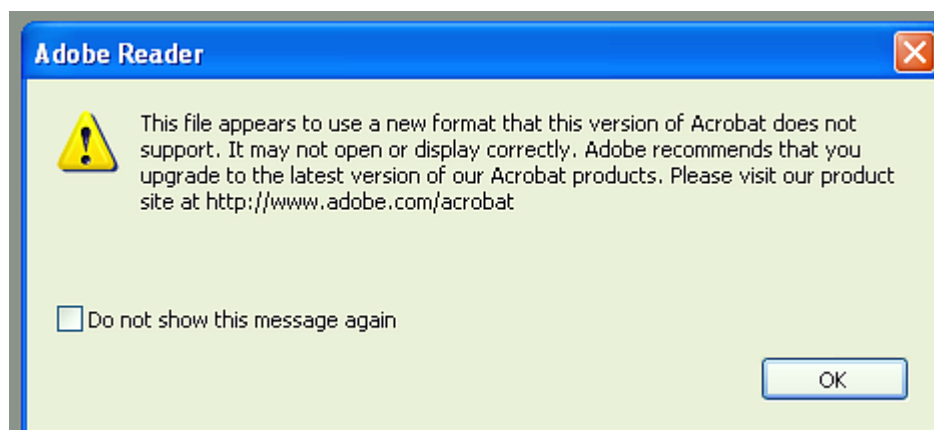
Edit – Preferences - Internet tab
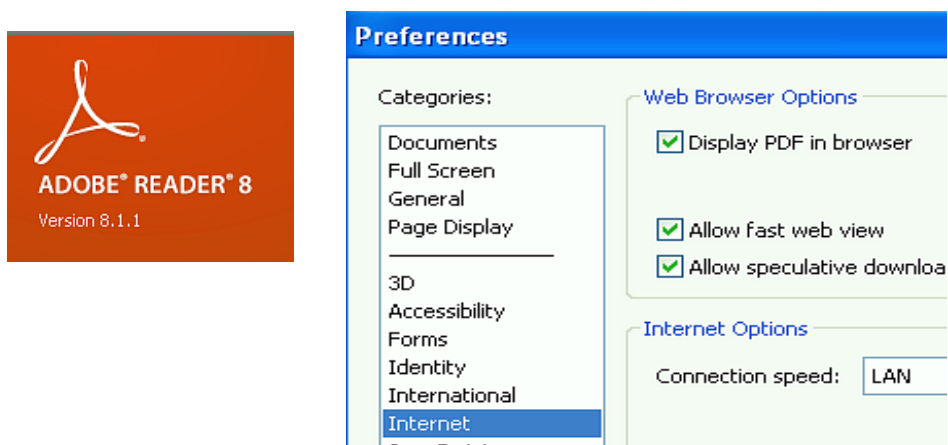
Issues and Information for Adobe 6 users:

If you have Adobe Reader 6 or any version earlier than Adobe Reader 8, here are your issues and considerations:

1- FINET documents and reports may be impacted. The user may get an Internet Explorer Security warning page and may be asked to download the file or make changes to their security. Do not make any changes to your security. Some computers just lock up and do nothing. When asked to download the file, select that option. This may work, but in some cases will not.

2- Web Forms and eforms will issue an informational message that the form may not load properly and suggests the user upgrade to a later version. Finance suggests the user upgrade their Adobe Reader.
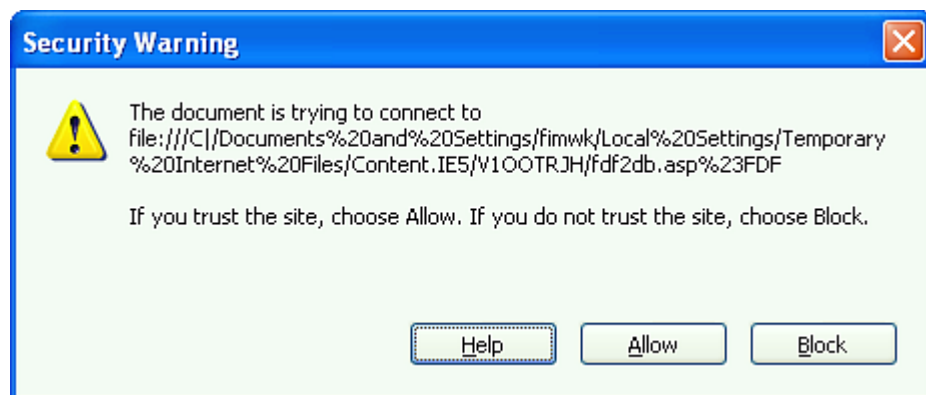
Issues and Information for Adobe 8 users:

If you have Adobe Reader 8 and the "Display PDF in Browser" checkbox is **NOT** selected, here are your issues and considerations:
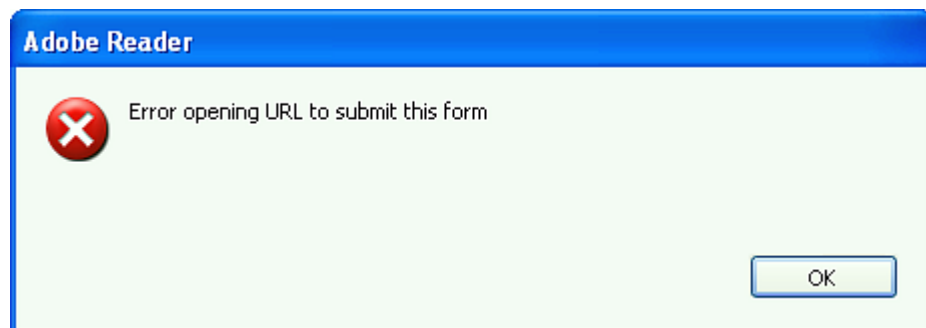

1- Finet documents and reports will work.

2- Web forms will work.

3- Eforms will not connect to the forms database to retrieve you personal information nor will it save any data to the forms database. You may print the form, but certain fields will not be accessible to enter data.

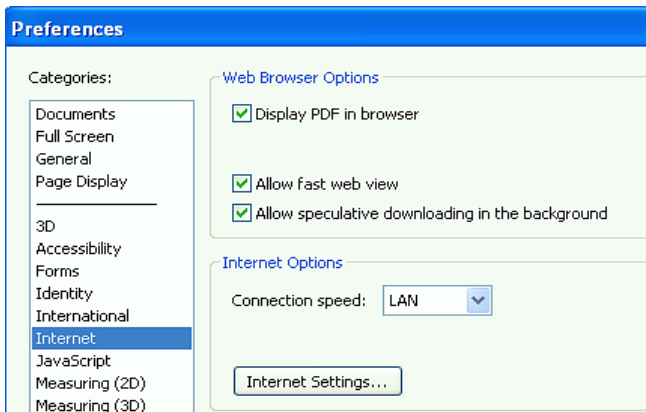A security warning comes up depending on the security on the PC.

The form could not connect to the database.

If you have Adobe Reader 8 and the "Display PDF in Browser" checkbox is selected, here are your issues and considerations:
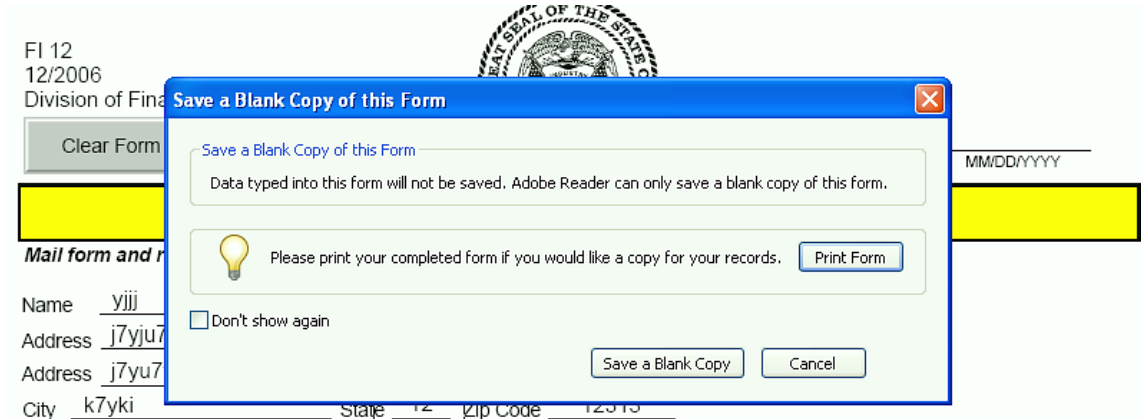
1- The Finet documents and reports will print.

2- The web forms will print.

This form cannot be saved and prints using the small printer icon near the upper left.
Selecting the save button returns this message.

3- The eforms will print and save to the database.

Enter the information on the form, sign, save and print the form. Save using the database actions and print using the small printer icon on the menu bar near the upper left corner.
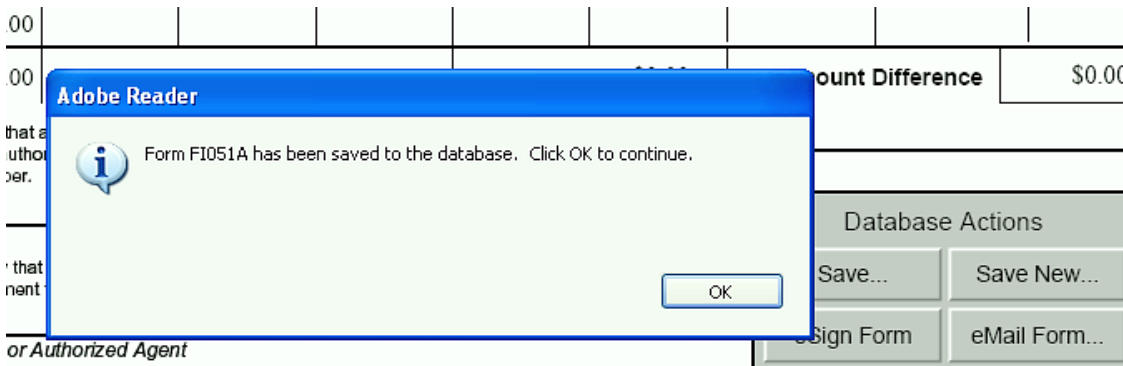
Print the form as needed using the printer icon.

T R A I N E R S   C O R N E R

November Training Schedule

Payables
      11/6 – 8 am – noon

Cash Receipts
      11/6 – 1 pm – 5 pm

Purchase Orders
      11/7 – 8 am – noon

Receivables
      11/7 – 1 pm – 5 pm

Budgeting
      11/8 – 8 am – noon

Requisitions
      11/8 – 1 pm – 5 pm

Fixed Assets
      11/13 – 8 am – noon

Internal Transactions
      11/14 – 8 am – noon

TO REGISTER FOR ANY OF THESE COURSES:

Link to: http://www.apps.finance.utah.gov:8090/quest/finet/syllabus/syllabus.htm. Course descriptions are available from the Finance Home Page at http://www.finance.utah.gov. Click on the Training button.